Linked.Exchange

Insurance Platform Development

The power behind your performance.

Who are we?

- Technology company focused on quoting, enrollment and administration solutions for individual, group and membership based programs.
- Non-Benefitted employee product enrollment & administration solutions.
- Customizable SaaS solutions to meet the needs of insurance carriers & TPA's to FMO's and call centers.
- Ability to customize solutions for any type of product.
- Proprietary PDF enrollment solutions with true electronic signature process.
- Downline agency management & reporting.
- Invoice payment management.
- More!

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Features

Quote & Enroll
Administer

Dynamic Group
Case Management

Employer &
Employee
Dashboards

Non-Benefitted
Employee
Quote/Enroll

Group &
Individual
Products

Exportable Client
Data Reporting

ACA & Ancillary
Application
Processing

Employee Self
Service
Much More!

Invoice
Management
Solutions

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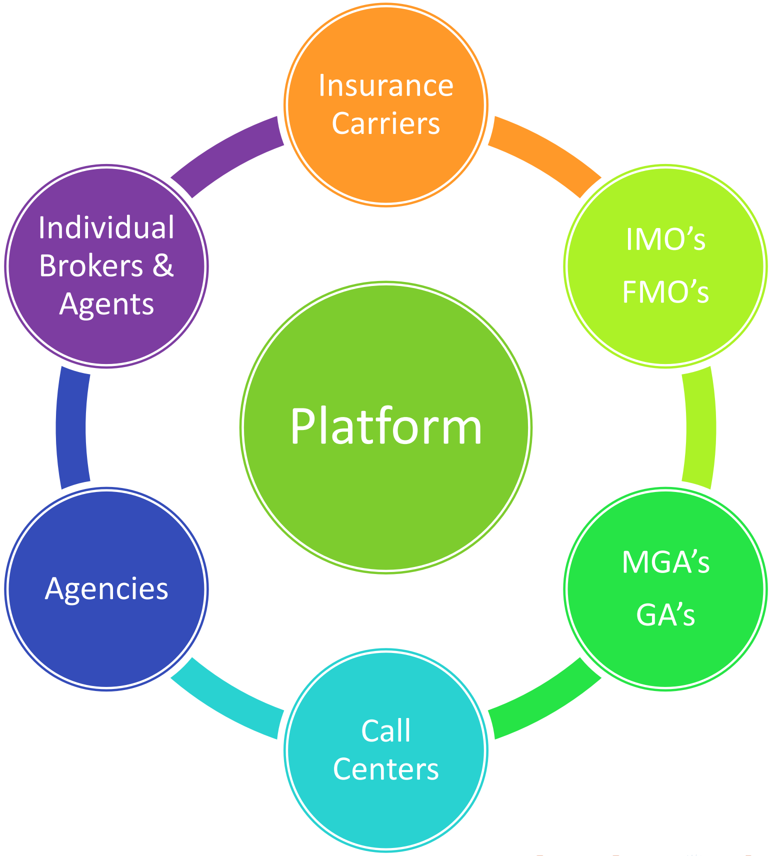
Who is this designed for?

- Insurance Carriers
- TPA's
- Financial Institutions
- Associations
- Insurance Marketing Organizations
- Call Centers
- Agencies
- Group & Individual Direct Business



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What sets us apart?

- Broker-centric platform
- We can develop application submissions for any insurance type
- We are a technology company only, not an insurance carrier or FMO
- Our carrier relationships position us to help our partners with unique marketing incentives for their producers
- Our platform design is straightforward and easy to use
- We can customize the platform and carrier offerings for partners (Grow your platform as you grow your business!)
- The platform positions agencies to easily capture “Non-Benefitted” employees within a group case
  - New Markets – You don’t have to be a group producer to capture these blocks of business
- The platform is a “24/7, 365-days-a-year business support system” helping brokers and agencies grow their book, instead of only replacing losses
- Easy to understand “Support Center” for users
- Audit trails to track member change information

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Customizable Group Client Solutions

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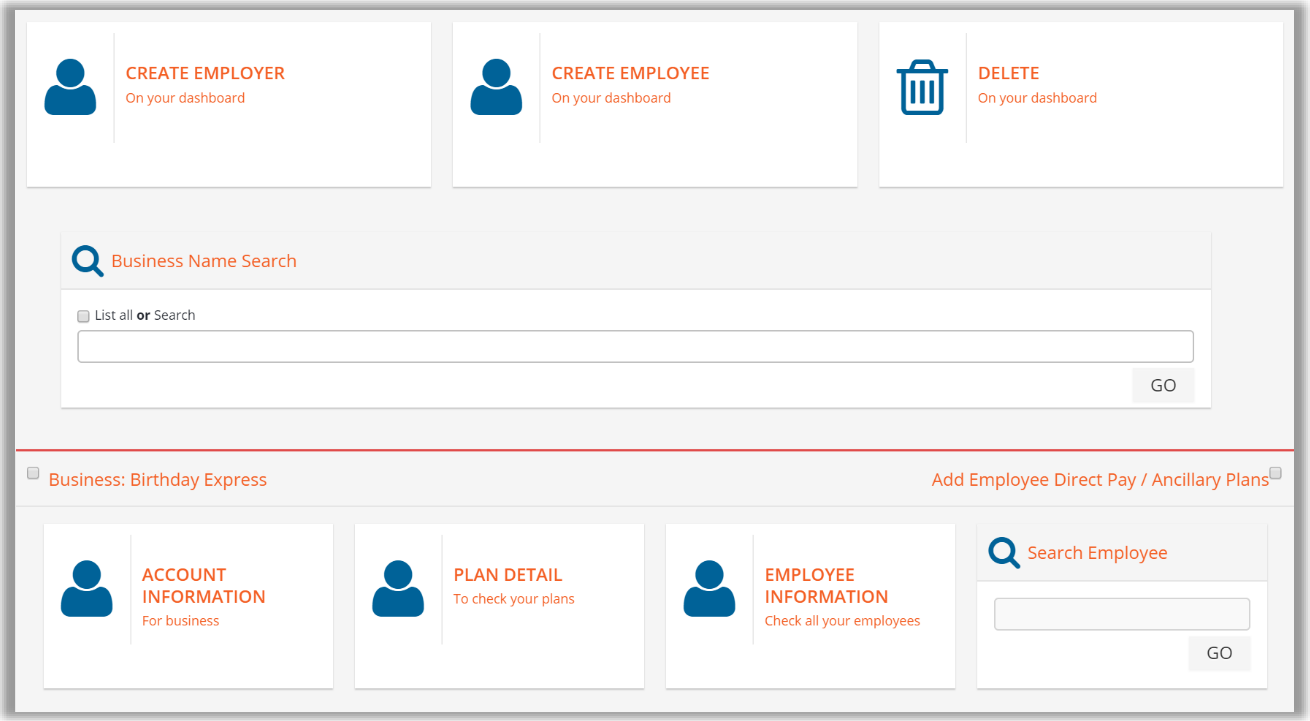
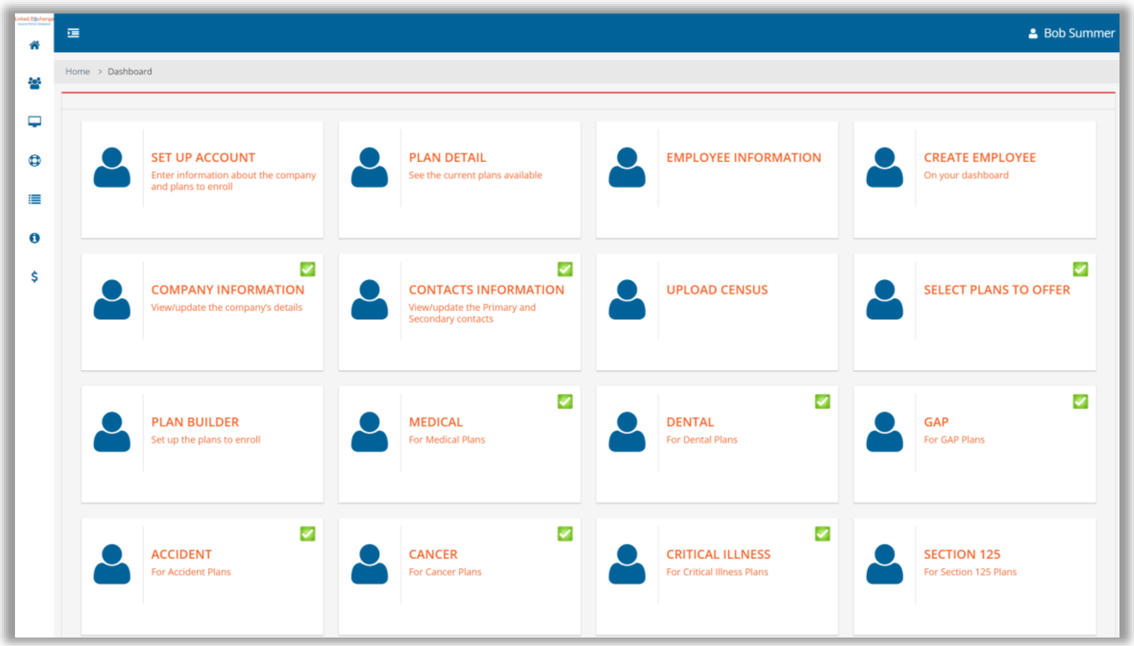
Group Solutions

Easily build new custom group enrollment portals dynamically, upload group accounts or employee census files, create new employees and access group information!



Group Solutions

Easy access for a broker, employer or plan administrator to dynamically build a custom enrollment solution for most any type of plan. Set up accounts in less than 10 minutes!



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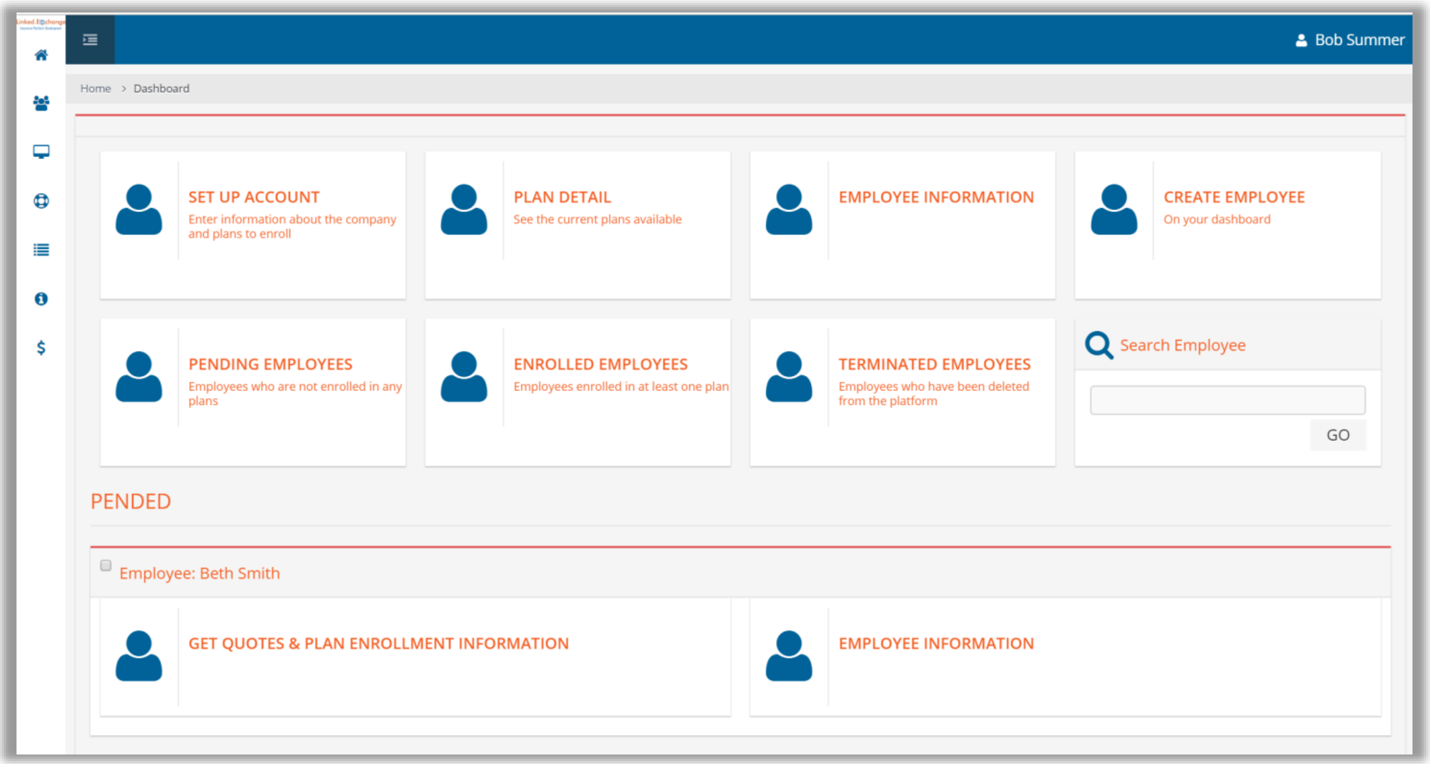
Group Solutions

Quick & easy access to employee information for plan administrator, agency, broker & employer! User access can be restricted for any level.



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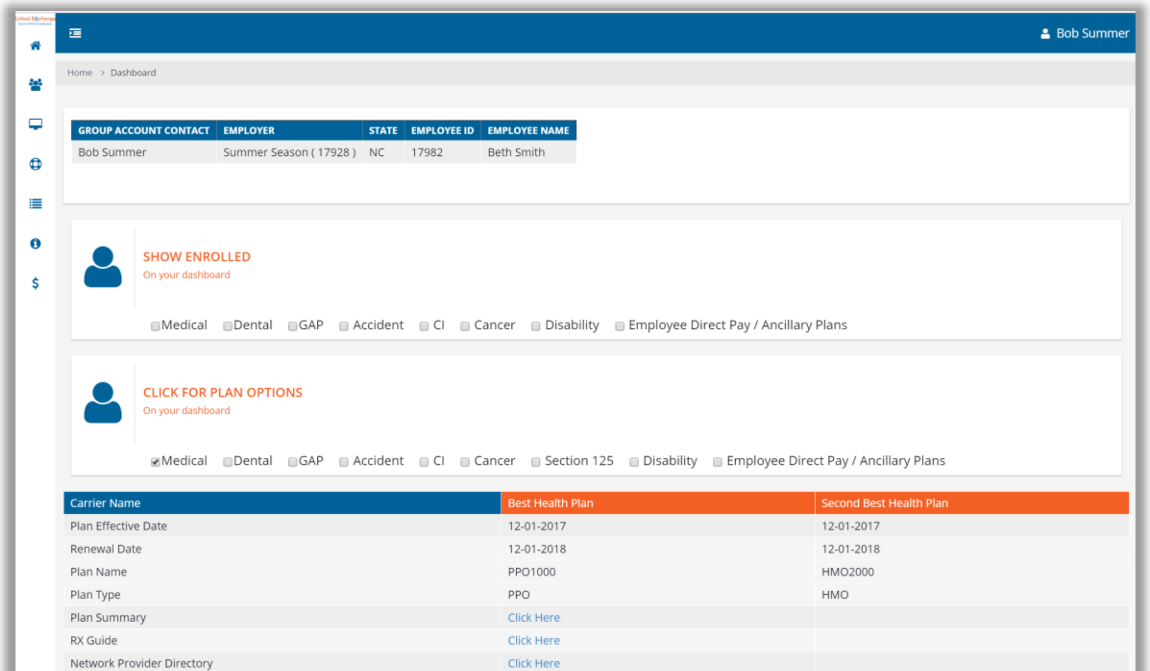
Group Solutions

Easily look up benefit options for full-time, part-time, 1099, seasonal and non-benefitted employees. Compare plans, update employee information enroll and look-up existing current enrollment information.



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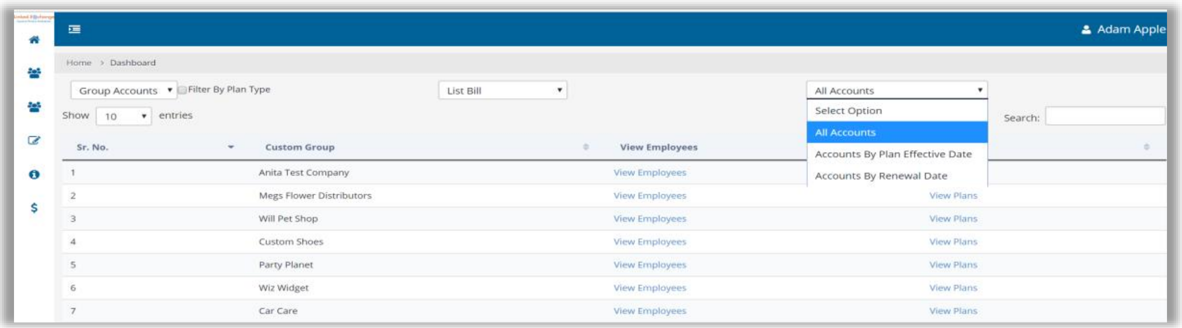
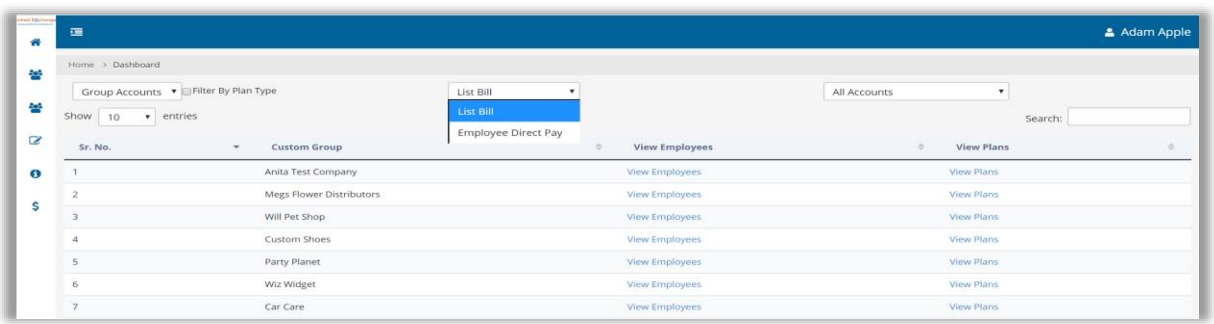
Group Solutions

Easily search accounts by plan effective date, renewal date and/or by status such as list bill or employee direct pay accounts





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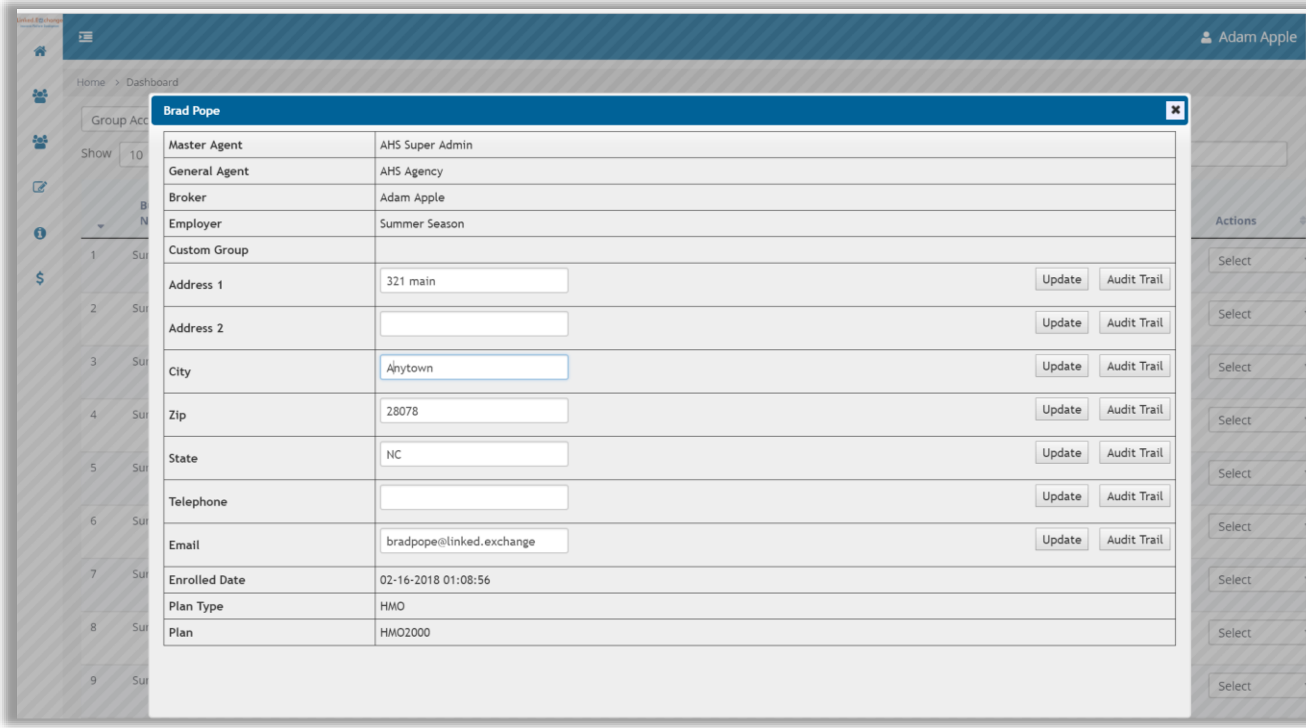
Group Solutions

Access account audit trail information by employee to track all changes made at any level, such as address, dependents, enrollment elections and more!



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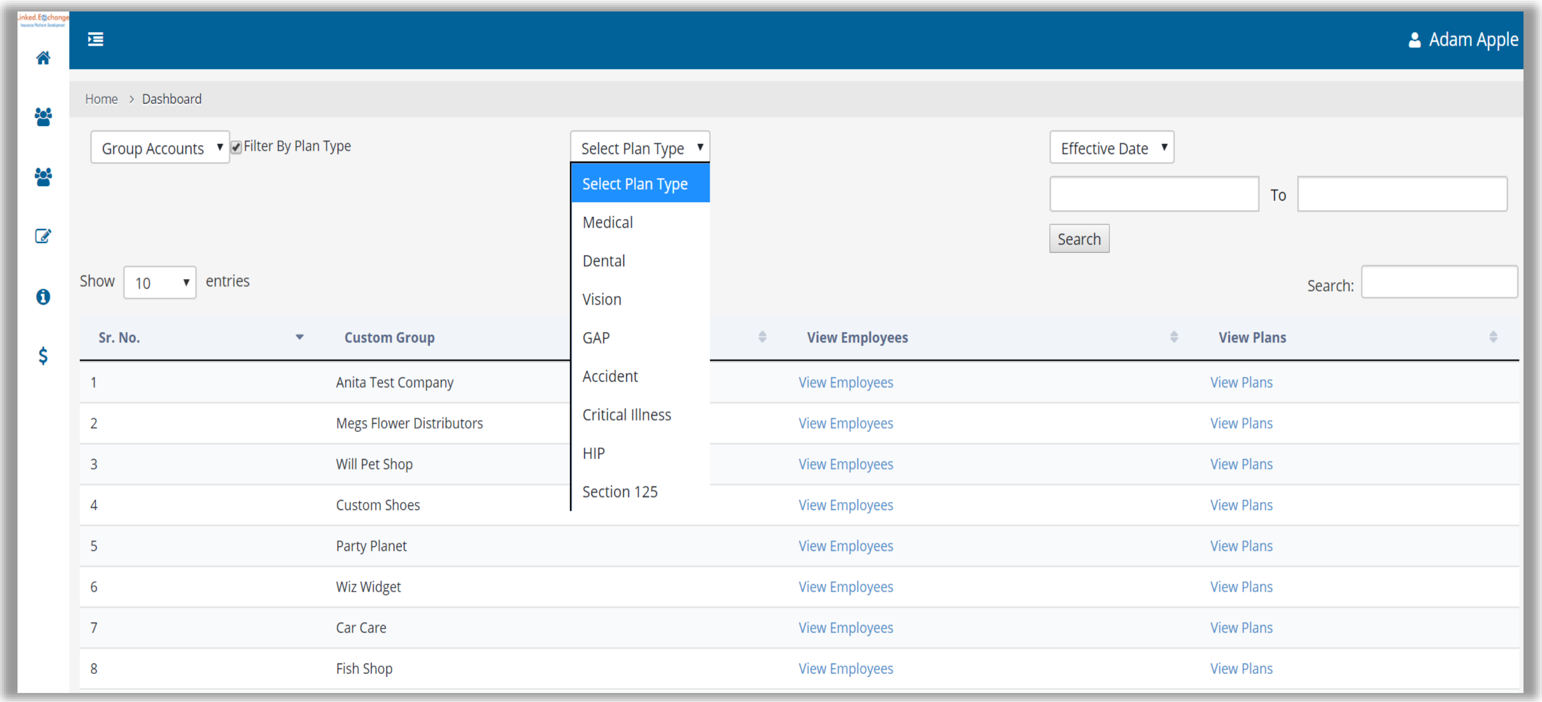
Group Solutions

Search accounts by specific plan types offered:



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Individual

Client Center

On & Off Exchange

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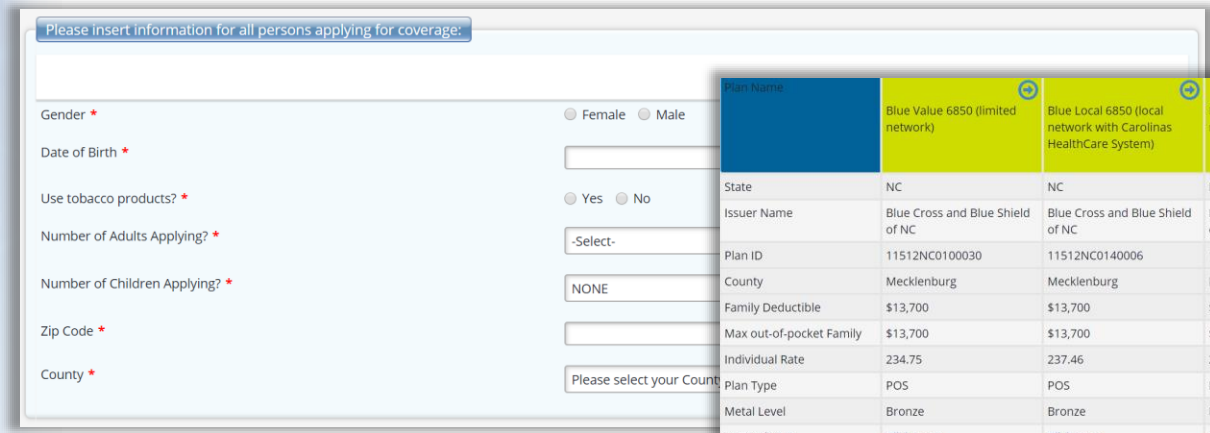
Individual Client Center

Easy quoting and application process!


Please insert information for all persons applying for coverage:

Gender * ○ Female ○ Male

Date of Birth *

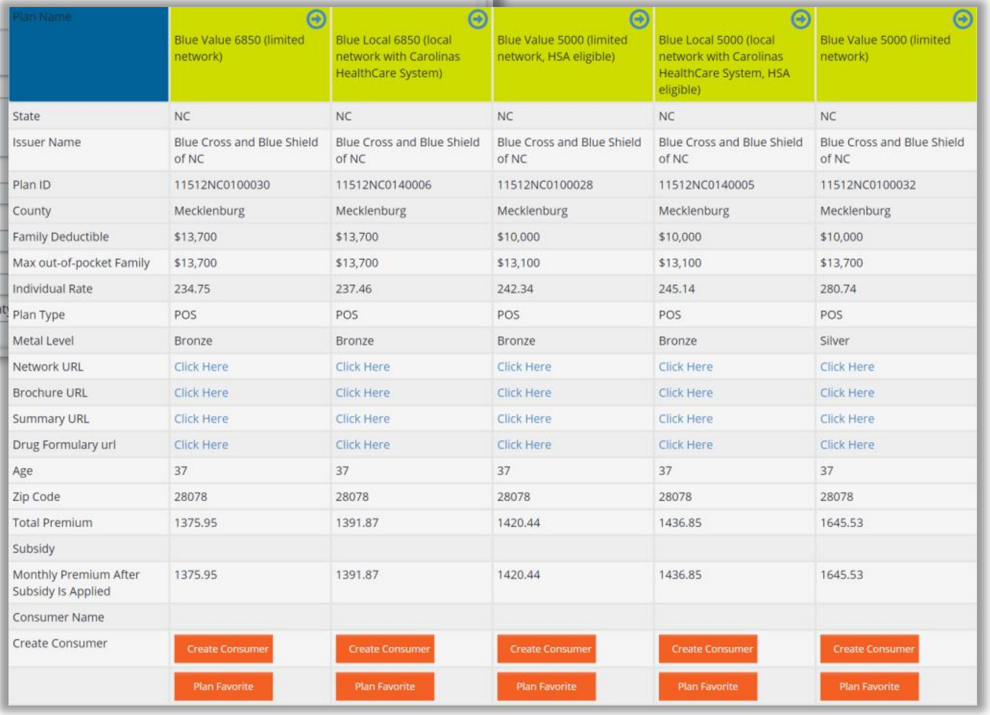
Use tobacco products? * ○ Yes ○ No

Number of Adults Applying? * -Select-

Number of Children Applying? * NONE

Zip Code *

County * Please select your County



Plan Name	Blue Value 6850 (limited network)	Blue Local 6850 (local network with Carolinas HealthCare System)	Blue Value 5000 (limited network, HSA eligible)	Blue Local 5000 (local network with Carolinas HealthCare System, HSA eligible)	Blue Value 5000 (limited network)
State	NC	NC	NC	NC	NC
Issuer Name	Blue Cross and Blue Shield of NC	Blue Cross and Blue Shield of NC	Blue Cross and Blue Shield of NC	Blue Cross and Blue Shield of NC	Blue Cross and Blue Shield of NC
Plan ID	11512NC0100030	11512NC0140006	11512NC0100028	11512NC0140005	11512NC0100032
County	Mecklenburg	Mecklenburg	Mecklenburg	Mecklenburg	Mecklenburg
Family Deductible	$13,700	$13,700	$10,000	$10,000	$10,000
Max out-of-pocket Family	$13,700	$13,700	$13,100	$13,100	$13,700
Individual Rate	234.75	237.46	242.34	245.14	280.74
Plan Type	POS	POS	POS	POS	POS
Metal Level	Bronze	Bronze	Bronze	Bronze	Silver
Network URL	Click Here	Click Here	Click Here	Click Here	Click Here
Brochure URL	Click Here	Click Here	Click Here	Click Here	Click Here
Summary URL	Click Here	Click Here	Click Here	Click Here	Click Here
Drug Formulary url	Click Here	Click Here	Click Here	Click Here	Click Here
Age	37	37	37	37	37
Zip Code	28078	28078	28078	28078	28078
Total Premium	1375.95	1391.87	1420.44	1436.85	1645.53
Subsidy					
Monthly Premium After Subsidy Is Applied	1375.95	1391.87	1420.44	1436.85	1645.53
Consumer Name					
Create Consumer	Create Consumer	Create Consumer	Create Consumer	Create Consumer	Create Consumer
	Plan Favorite	Plan Favorite	Plan Favorite	Plan Favorite	Plan Favorite

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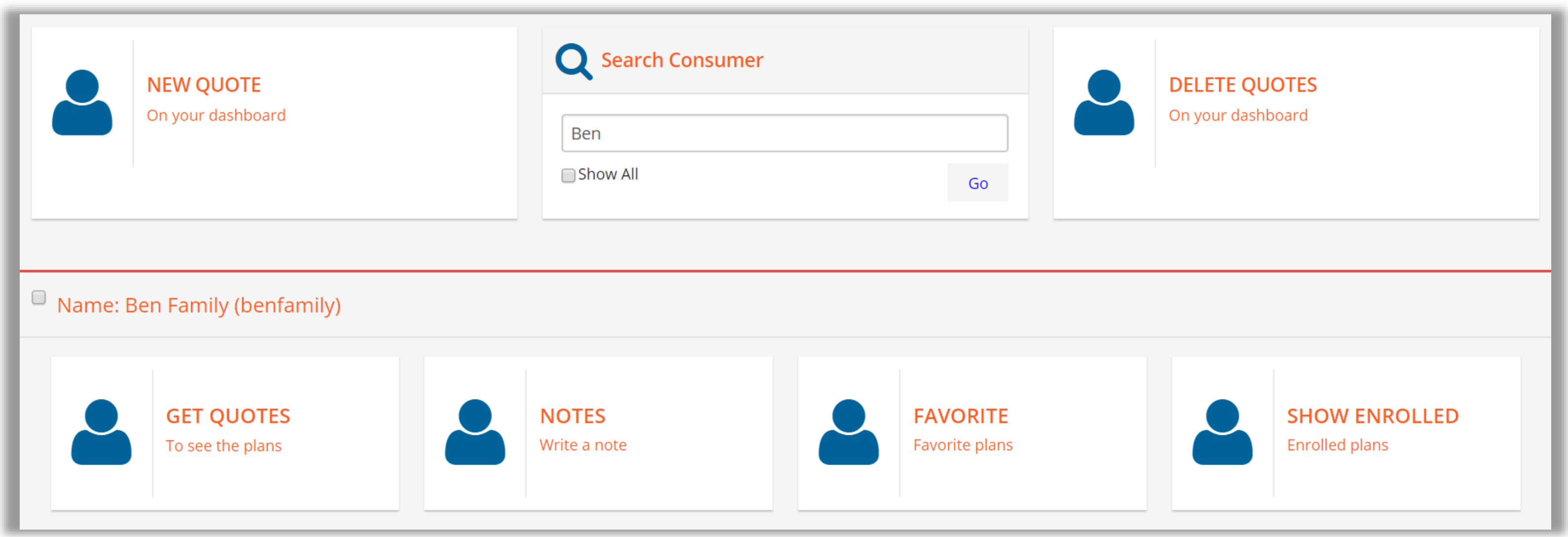
Individual Client Center

All prospects and “sold” clients are tracked in the platform. You can see their enrolled plans, favorites, run new quotes and make notes to refer back to at a later date.



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Favorites

ACA Plan Favorites:

Plan Name	Blue Value 5000 (limited network, HSA eligible)	Blue Value 6850 (limited network)
State	NC	NC
Issuer Name	Blue Cross and Blue Shield of NC	Blue Cross and Blue Shield of NC
Plan ID	11512NC0100028	11512NC0100030
County	Mecklenburg	Mecklenburg
	$10,000	$13,700
	$13,100	$13,700
Individual Rate	242.34	234.75
Plan Type	POS	POS
Metal Level	Bronze	Bronze
Network URL	Click Here	Click Here
Brochure URL	Click Here	Click Here
Summary URL	Click Here	Click Here
Drug Formulary url	Click Here	Click Here
Age	37	37
Zip Code	28078	28078
	484.68	469.50
Quote For		
Total Premium	1420.44	1375.95
Subsidy	0	0
Monthly Premium After Subsidy Is Applied	1420.44	1375.95

You and your clients can tag plans as "Favorites", allowing you to easily look and compare various elements like copays, deductibles, out-of-pockets maximums and much more!

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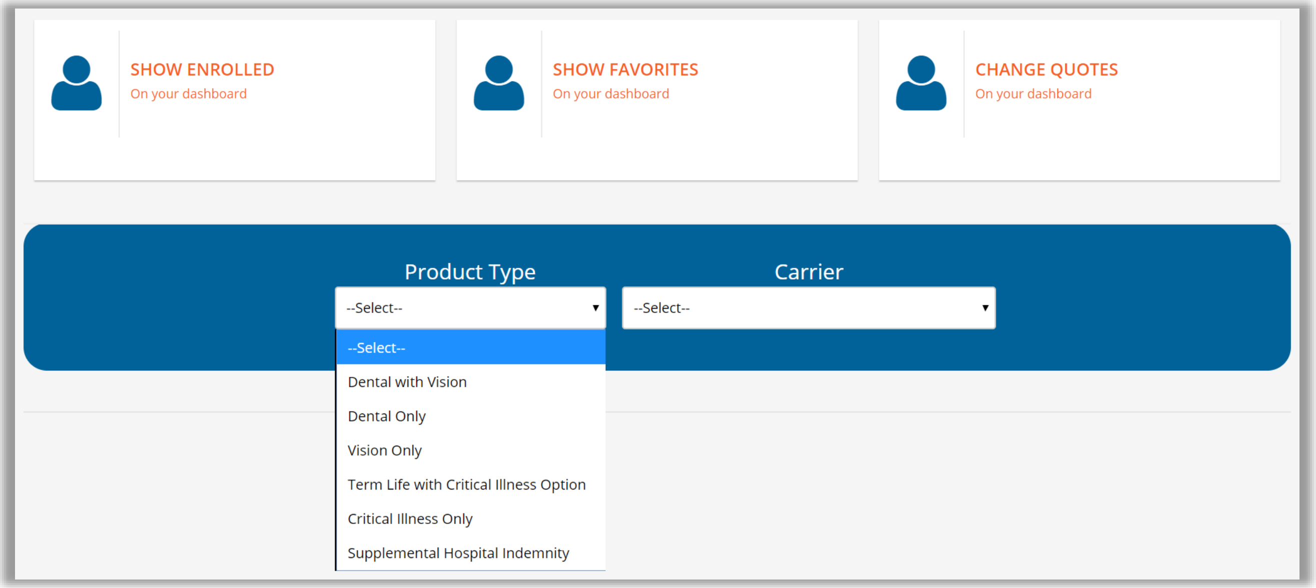
Ancillary Plans



Your clients can apply for approved ancillary plans 24/7!

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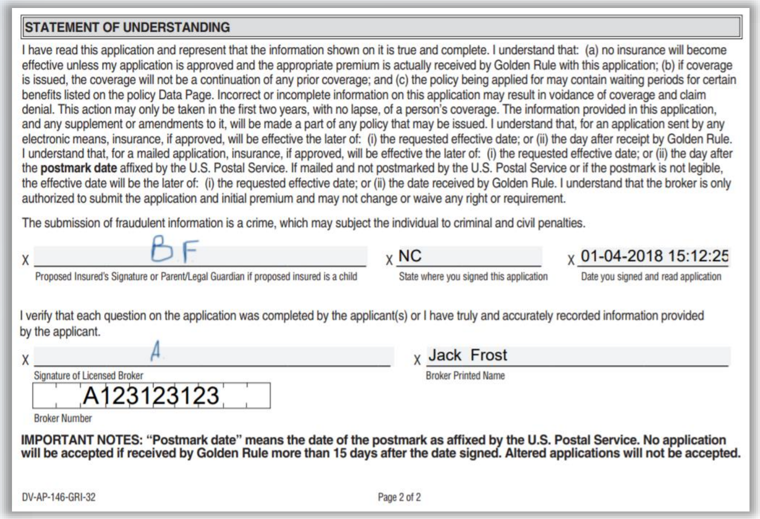
Anaillary Plan Applications



STATEMENT OF UNDERSTANDING

I have read this application and represent that the information shown on it is true and complete. I understand that: (a) no insurance will become effective unless my application is approved and the appropriate premium is actually received by Golden Rule with this application; (b) if coverage is issued, the coverage will not be a continuation of any prior coverage; and (c) the policy being applied for may contain waiting periods for certain benefits listed on the policy Data Page. Incorrect or incomplete information on this application may result in voidance of coverage and claim denial. This action may only be taken in the first two years, with no lapse, of a person's coverage. The information provided in this application, and any supplement or amendments to it, will be made a part of any policy that may be issued. I understand that, for an application sent by any electronic means, insurance, if approved, will be effective the later of: (i) the requested effective date; or (ii) the day after receipt by Golden Rule. I understand that, for a mailed application, insurance, if approved, will be effective the later of: (i) the requested effective date; or (ii) the day after the **postmark date** affixed by the U.S. Postal Service. If mailed and not postmarked by the U.S. Postal Service or if the postmark is not legible, the effective date will be the later of: (i) the requested effective date; or (ii) the date received by Golden Rule. I understand that the broker is only authorized to submit the application and initial premium and may not change or waive any right or requirement.

The submission of fraudulent information is a crime, which may subject the individual to criminal and civil penalties.

X BF — Proposed Insured's Signature or Parent/Legal Guardian if proposed insured is a child
X NC — State where you signed this application
X 01-04-2018 15:12:25 — Date you signed and read application

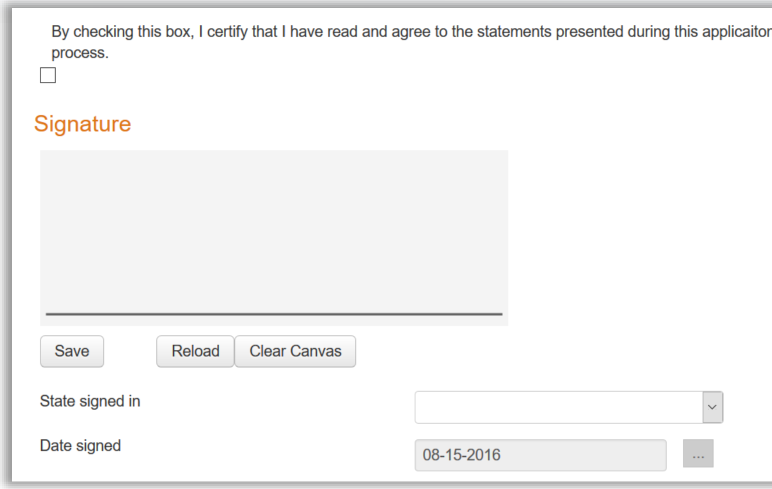
I verify that each question on the application was completed by the applicant(s) or I have truly and accurately recorded information provided by the applicant.

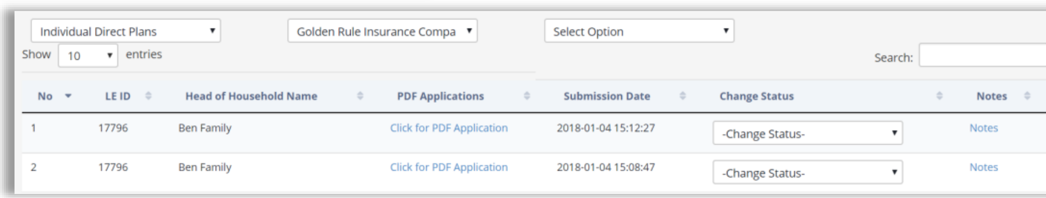
X A — Signature of Licensed Broker
X Jack Frost — Broker Printed Name

A123123123 — Broker Number

IMPORTANT NOTES: "Postmark date" means the date of the postmark as affixed by the U.S. Postal Service. No application will be accepted if received by Golden Rule more than 15 days after the date signed. Altered applications will not be accepted.

DV-AP-146-GRI-32 Page 2 of 2





No	LE ID	Head of Household Name	PDF Applications	Submission Date	Change Status	Notes
1	17796	Ben Family	Click for PDF Application	2018-01-04 15:12:27	-Change Status-	Notes
2	17796	Ben Family	Click for PDF Application	2018-01-04 15:08:47	-Change Status-	Notes

Ancillary products are enrolled using our proprietary electronic PDF enrollment technology, that captures a true electronic signature. We can build any application into our platform, for any carrier.

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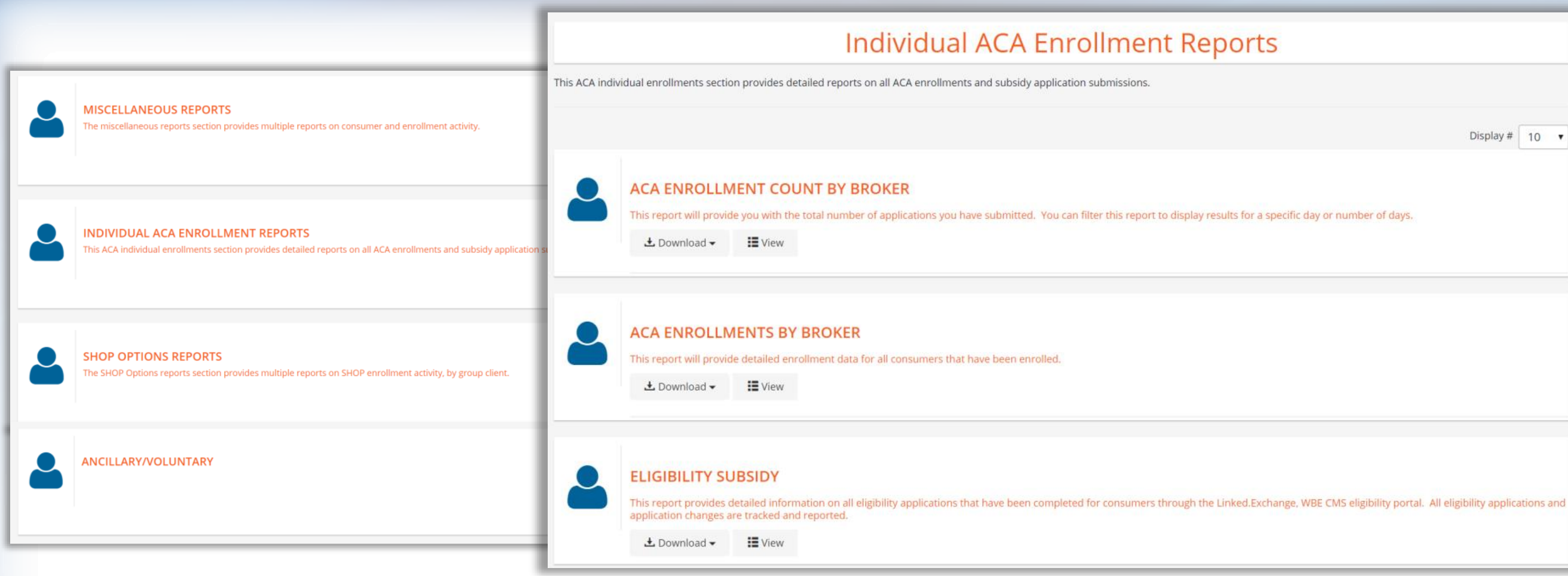
Reports & Data Access



The platform is built in a hierarchical format. There are multiple levels for agency, producers, employers and consumers/employees. Custom reports can also be created for each level. Reporting allows you to download enrollment data into a PDF or CSV file. You can use this data to track plans, eligibility and other information you need to follow.

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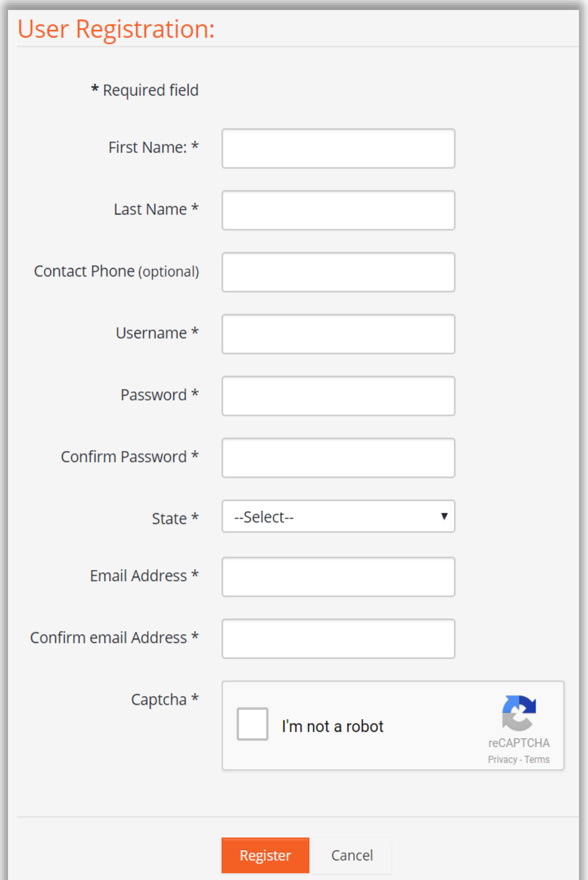
Consumer Dashboard



Set up your clients with their own private login. They can view their quote, compare plans and apply for coverage.

No email links to send… Email can get caught in a spam filter and does not give your client follow-up options!

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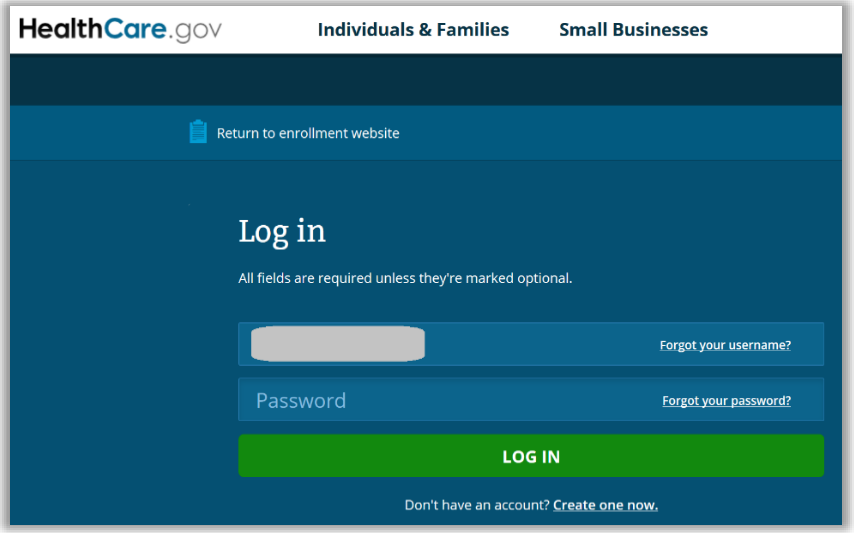
FFM Access

As an approved ACA agent/broker, you can access the FFM directly from our platform. As a CMS-certified Web-Broker Entity (WBE), our Private Insurance Exchange allows you move seamlessly back and forth. Most of the data entered on the FFM site is captured in our platform, giving you year-round access to your clients' information for enrollment and client management.



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Agency Administration Portal

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Agency Administration

User Administration

Show 10 entries

Search:

Agency Name	Name	Username	Email	Registration Status	
All Seasons Insurance Agency	Jack Frost	allseasons	AllSeasons@linked.exchange	Approved	View
Ron Jon Test Agency	Ron Jon Test	ronjontest	rontest@linked.exchange	Approved	View
Test Rep B	Rep B	testrepB	testrepB@linked.exchange	Approved	View
Test Rep C	Rep C	testrepC	testrepC@linked.exchange	Approved	View

Agencies have visibility into all of their producers, and the ability to modify their access to carriers, state-by-state. You can register new producers with the click of a button.

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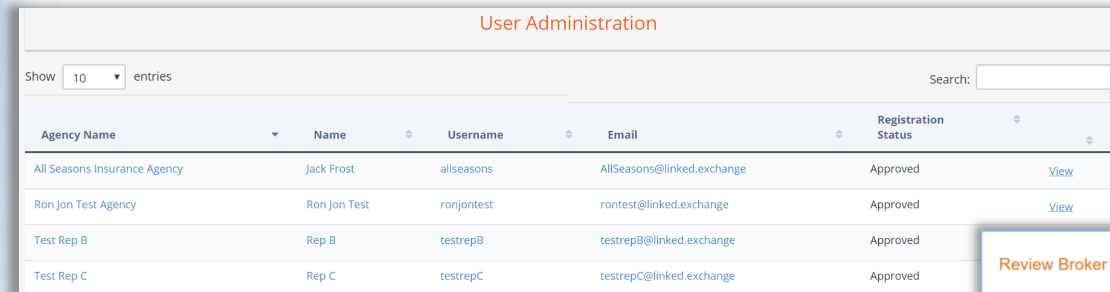
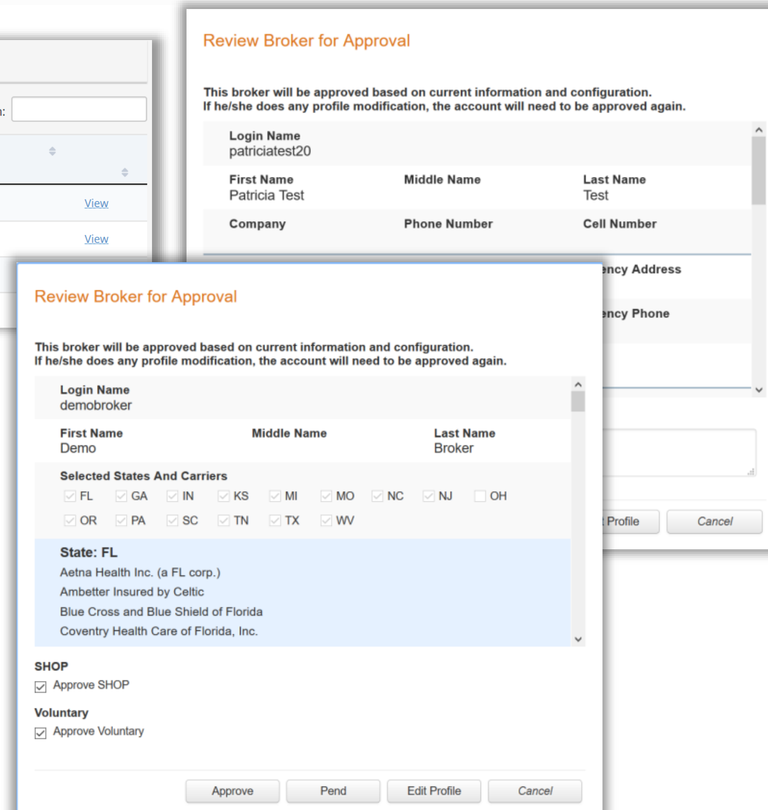
Agency Administration



User Administration

Show 10 entries Search:

Agency Name	Name	Username	Email	Registration Status	
All Seasons Insurance Agency	Jack Frost	allseasons	AllSeasons@linked.exchange	Approved	View
Ron Jon Test Agency	Ron Jon Test	ronjontest	rontest@linked.exchange	Approved	View
Test Rep B	Rep B	testrepB	testrepB@linked.exchange	Approved	
Test Rep C	Rep C	testrepC	testrepC@linked.exchange	Approved	



From the main screen, you can see all of your producers. And with a quick click of the View button, you'll see all of their pertinent information. Here, you see the broker's contact information as well as the active states and carriers. The agency portal has many options such as access to all applications, notes, documents processing and storage and much more!

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Thank You!

Contact us today to schedule a demo